

Jared Johnson

*Deputy State Chief Information Officer and
Chief Deputy Director
California Department of Technology*



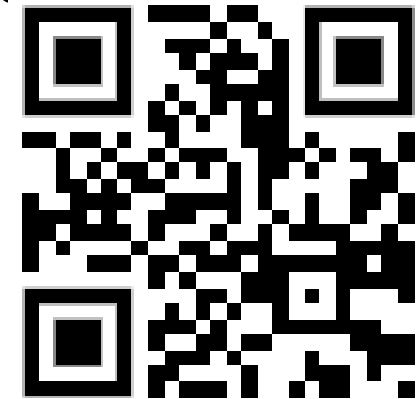
Welcome

Executive Order N-12-23



3.c. By January 2025, the Government Operations Agency, the California Department of General Services, and the California Department of Technology **shall update the State's project approval, procurement, and contract terms**, incorporating analysis and feedback obtained through the processes outlined in 3.a. and 3.b.

Link to EO: <https://tinyurl.com/2rrfdshd>



GenAI for CA Website

California is the home of GenAI

Learn what CA is doing



<https://www.genai.ca.gov/>

- News/Reports
- Resources/Links

- Procurement Guidelines
- Self-paced and instructor led training

- User Journeys
- Vendor opportunities

Tim Issertell

*Deputy Director, CA Project Management Office
California Department of Technology*



**State Policy Updates
Project Delivery Lifecycle**

State Administrative Policy Changes



California
DEPARTMENT OF TECHNOLOGY
STRATEGY INNOVATION DELIVERY

State Administrative Manual

- **SAM 4819.2** IT Definitions
- **SAM 4986.1- 4986.13** Generative AI

State Information Management Manual

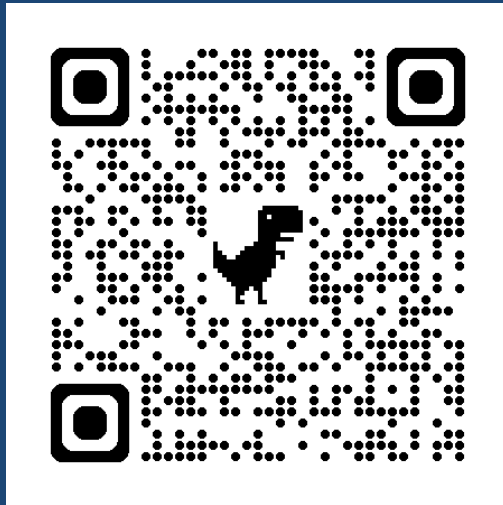
- **SIMM 71A and 71B** – Certification of Compliance with IT Policies
- **SIMM 5305-F** – Generative AI Risk Assessment
- **SIMM 19H** – Project Delivery Lifecycle for IT Projects Utilizing GenAI

State Administrative Policy Changes



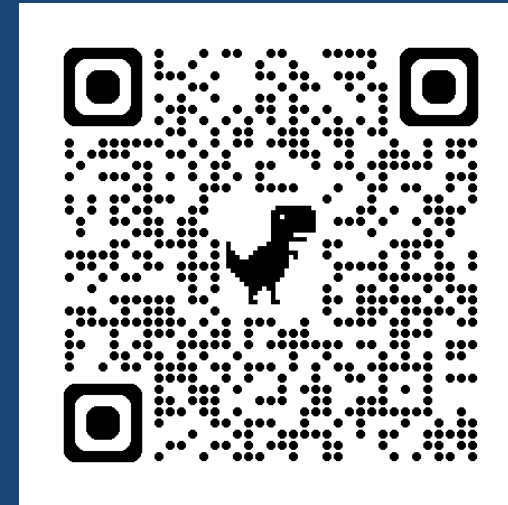
California
DEPARTMENT OF TECHNOLOGY
STRATEGY INNOVATION DELIVERY

State Administrative Manual (SAM)



[State Administrative Manual \(SAM\)](#)

State Information Management Manual (SIMM)



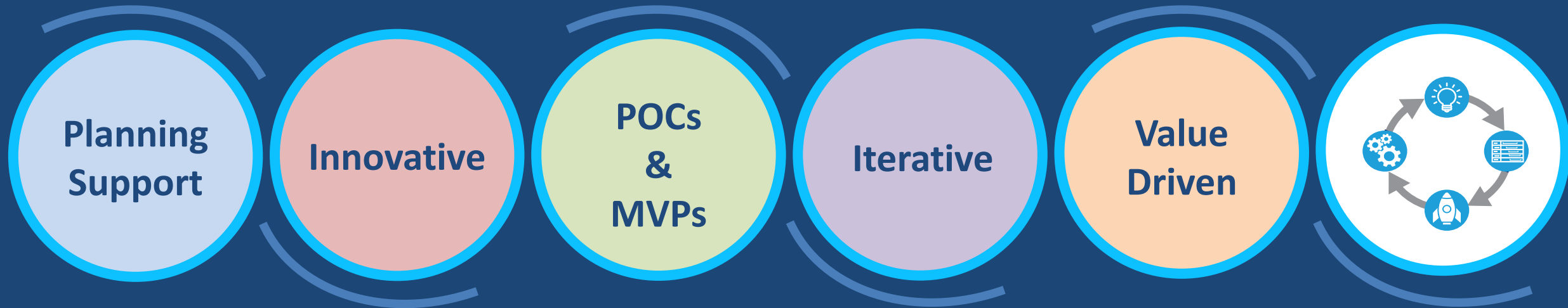
[State Information Management Manual \(SIMM\)](#)

Project Delivery Lifecycle



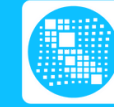
May Scale to other Technology Projects in 2026

Project Delivery Lifecycle

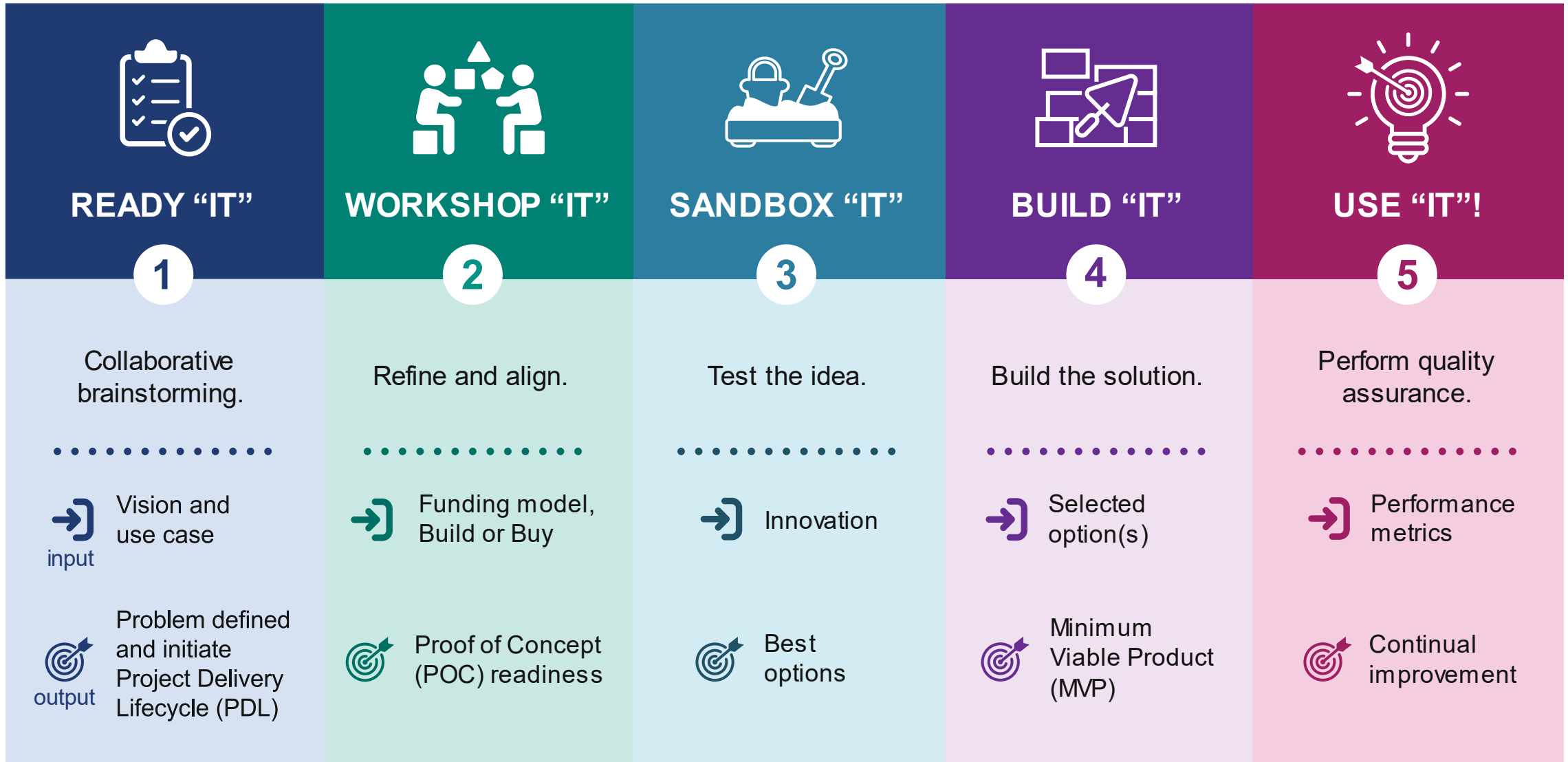


Project Planning, Approval, and Oversight for Intentional GenAI Projects

Project Delivery Lifecycle



California
DEPARTMENT OF TECHNOLOGY
STRATEGY INNOVATION DELIVERY



Benefits



Aligns business readiness, product development, and procurement.



Focuses on what is needed, when it's needed



Encourages market competition by leveraging requests for Innovative Ideas – RFI²

Hayley Figeroide

*Deputy Director, Strategic Initiatives
Office of Data & Innovation*



Innovation Lab and Playbook

Efficiency and Innovation Lab

- The Office of Data and Innovation (ODI) developed an Efficiency & Innovation Lab.
- Designed to support GenAI procurements to improve problem definition, reduce project risk, and improve Californians' customer experience of programs.



Benefits:

- Data readiness, including inventory and initial assessment
- Problem definition
- Stakeholder and customer mapping
- Use case equity considerations
- Early risk identification
- Defined problem statements
- Defined product team roles and responsibilities
- Executive and leadership awareness and buy-in

GenAI Innovation Playbook

- ODI has published a GenAI Innovation Playbook to <https://www.GenAI.ca.gov>.
- Offers self-guided worksheets.
- Many of the exercises are also useful to apply at the start of non-GenAI projects.



CALIFORNIA
Office of Data and Innovation

GenAI innovation playbook

January, 2025

Rob Trojan

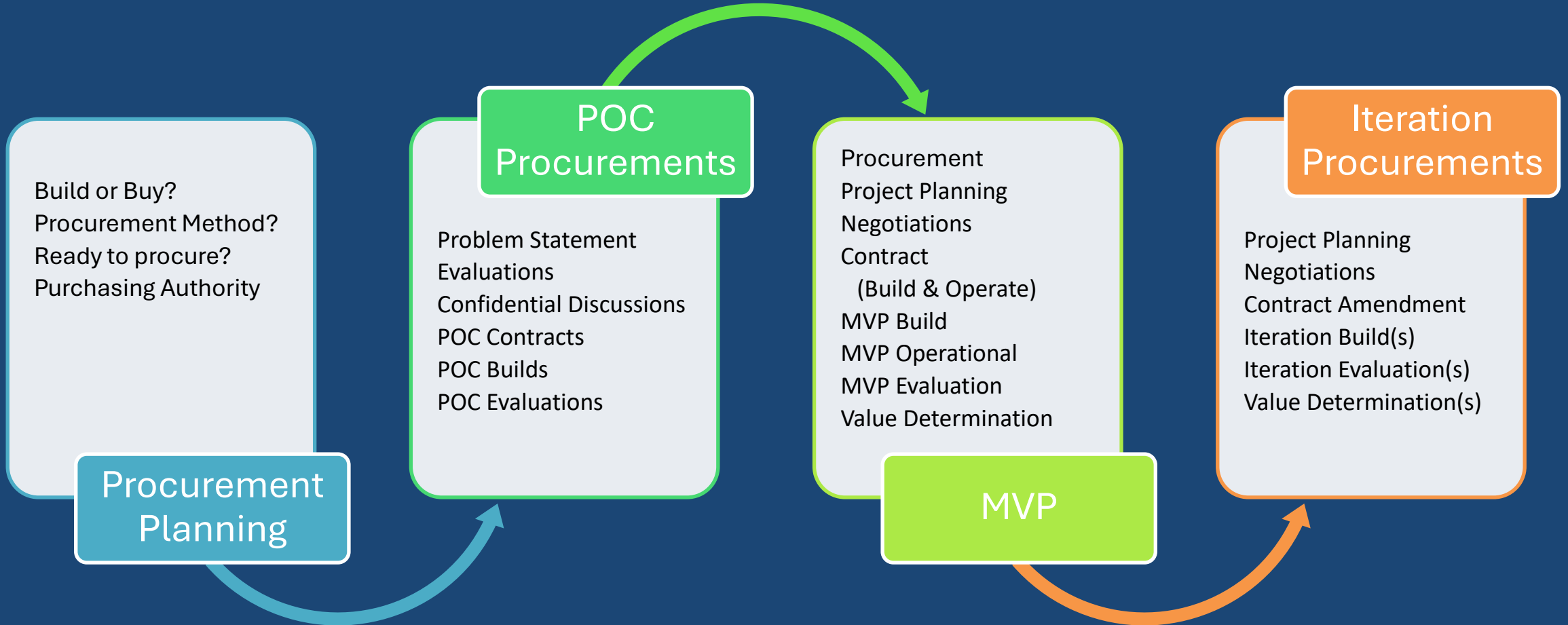
*Assistant Deputy Director, Statewide Technology
Procurement*

California Department of Technology



RFI² Procurement Process

RFI² Procurement Process



Tim Issertell

Deputy Director, CA Project Management Office

California Department of Technology



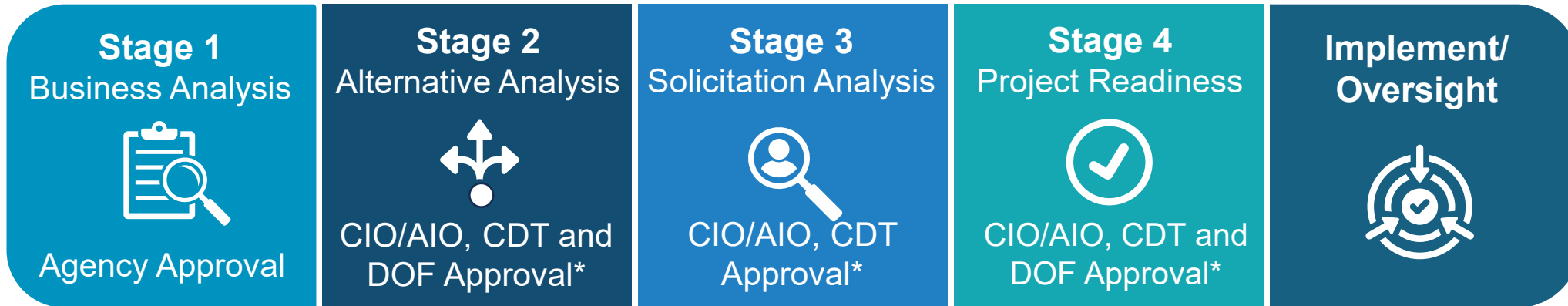
**PAL and PDL Side by Side
Project Success Workshop
Project Workbook
PDL Implementation Timeline**

PAL & PDL Side by Side

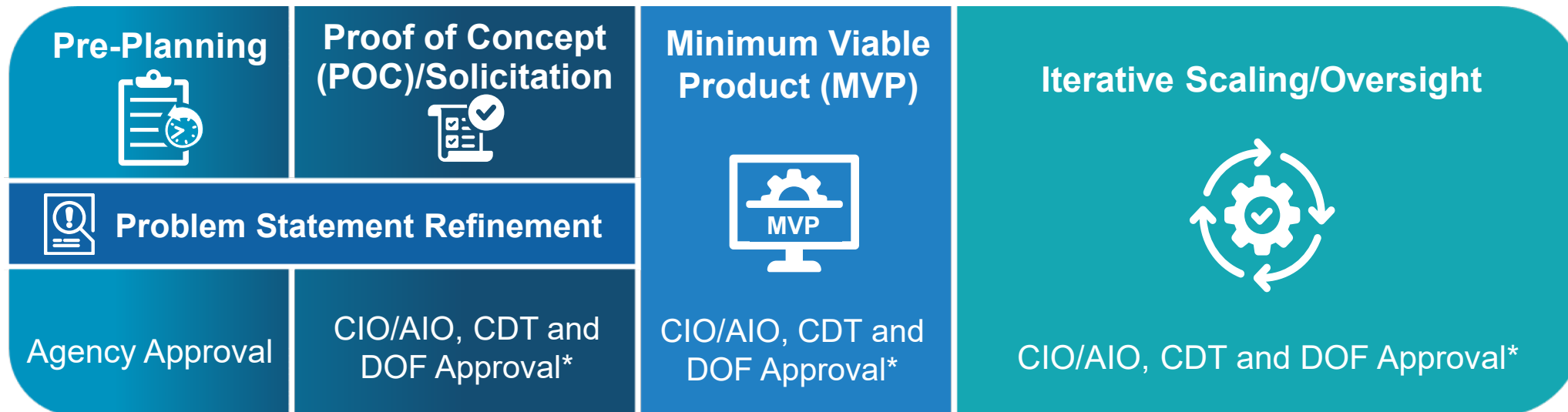


California
DEPARTMENT OF TECHNOLOGY
STRATEGY INNOVATION DELIVERY

Project Approval Lifecycle (PAL) – (Existing)



Project Delivery Lifecycle (PDL) – (New)



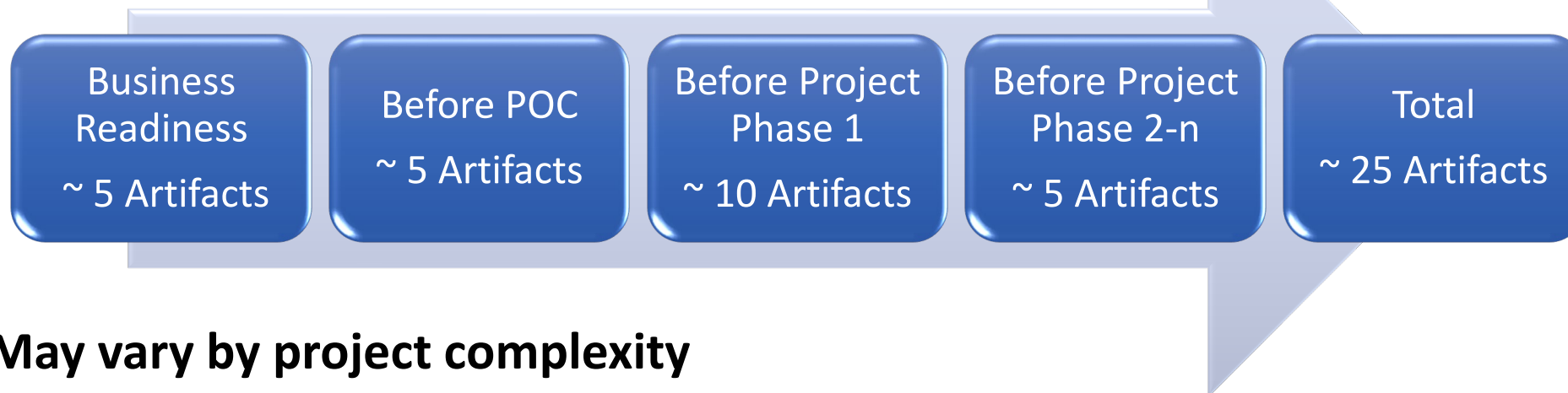
* Legislative Analyst's Office Notification

Project Delivery Lifecycle Efficiencies

PAL



PDL – IT Projects Utilizing GenAI



May vary by project complexity

Project Success Workshop

Project Best Practices

Capacity Building

**Project Success
Workshop**

Mandatory Online Course

Completion Certificate

Project Success Workshop

High-level curriculum

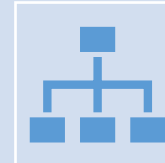
- Architecture Planning
- Project Governance
- Contract Management
- Risk Management
- Organizational Change Management



SIMM 19H Project Workbook



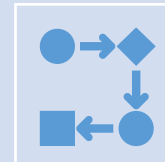
[Chapter 1](#) - Business
Readiness



[Chapter 2](#) - POC Phase

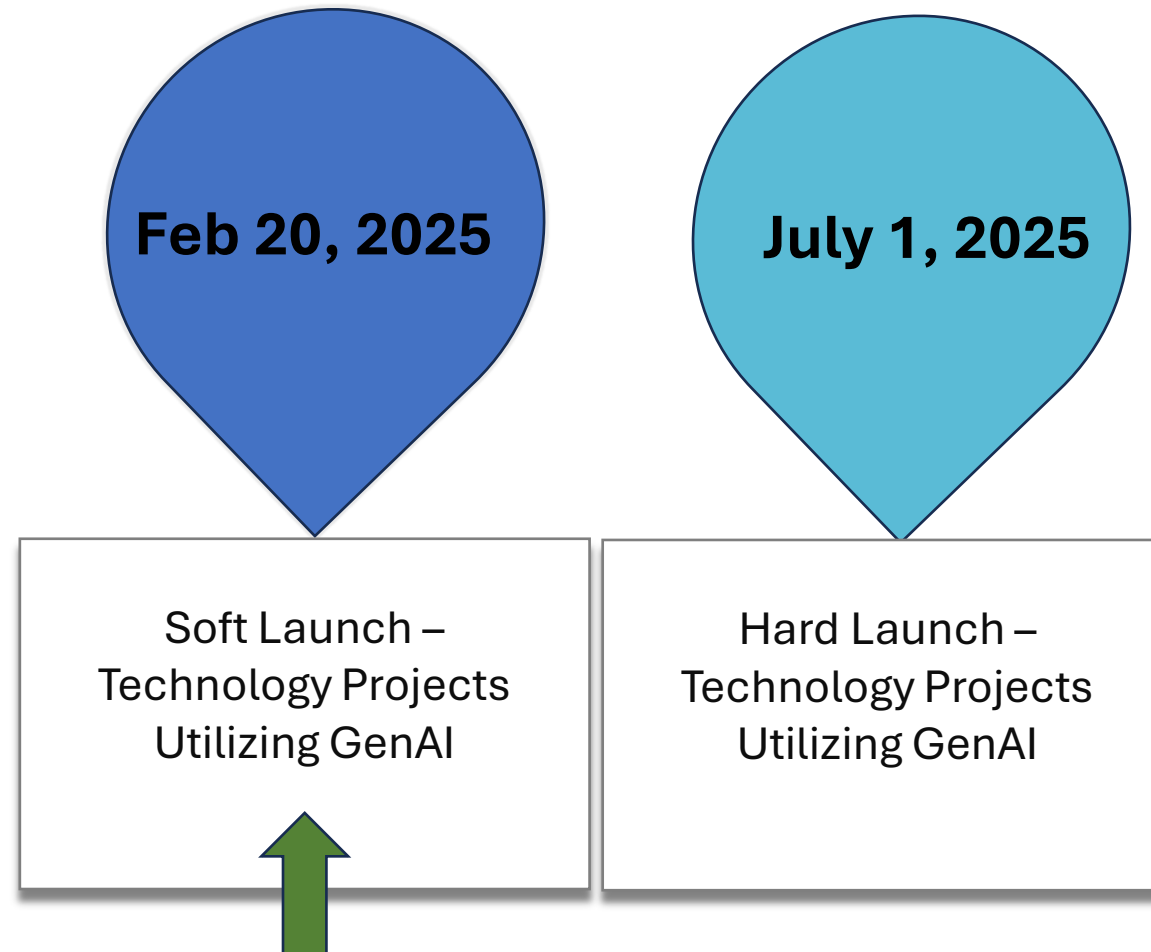


[Chapter 3](#) - Project
Phase 1 (MVP)



[Chapter 4](#) - Project Phase
2-n (Iterative)

PDL Implementation Timeline



Upcoming PDL Engagements

Customer Forum

- March 2025 (Soft Launch)
- Fall 2025 (Hard Launch)
- PDL High Level Overview

Vendor Forum

- March 2025
- GenAI Procurement Changes Overview

Journey Walk-throughs

- March-May (Soft Launch)
- Fall 2025 (Hard Launch)

Customer Workshops

- July (Hard Launch)
- Intended for those on an IT Project Journey for an IT Project Utilizing GenAI

All sessions to be delivered online

Thank You

Resources



California Department of Technology

Jared Johnson

Deputy State Chief Information Officer and
Chief Deputy Director

Tim Issertell

Deputy Director, CA-PMO
California Project Management Office
Office of Statewide Project Delivery

Rob Trojan

Assistant Deputy Director
Office of Statewide Technology Procurement

Department of General Services

Sarah Cering

Branch Chief, Statewide Procurement Policy, Training,
and Customer Services Branch
Procurement Division

California Office of Data and Innovation

Hayley Figeroid

Deputy Director, Strategic Initiatives

California Department of Human Resources (CalHR)

Kami Keszler

Senior Labor Relations Officer

Email your questions to: CDTGenAllIntakeRequest@state.ca.gov



Email your questions to: CDTGenAllIntakeRequest@state.ca.gov